1 Felipa A. Segura (Estate)

Case No. 11CEPR00155

Atty Boyett, Deborah K. (for Oscar Segura, Hector Segura & Felie Gonzalez – Co-Administrators/Petitioners)

(1) First and Final Report of Administrators on Waiver of Account and (2) Petition for Final Distribution and (3) for Order Fixing and Allowing Compensation to Attorneys for Ordinary and Extraordinary Services

		Anomeys for Ordinary and Extraordinary	T- 1
DC	D: 08/23/10	OSCAR SEGURA, HECTOR SEGURA and	NEEDS/PROBLEMS/COMMENTS:
		FELIE GONZALEZ, Co-Administrators, are	
		Petitioners.	
		A	
Co	ont. from	Accounting is waived.	
	Aff.Sub.Wit.		
√	Verified	POH - \$175,296.50 (all	
√	Inventory	cash)	
√	PTC	=	
√	Not.Cred.	Administrators- waived	
√	Notice of	Attorney - \$8,612.75	
	Hrg	(statutory)	
✓	Aff.Mail w/		
	Aff.Pub.	Attorney x/o - \$6,986.00 (29.10	
	Sp.Ntc.	hours @ \$225 - \$250/hr. for work in connection with a petition to	
	Pers.Serv.	determine ownership of estate	
	Conf.	property and for the sale of real	
	Screen	property)	
	Letters 04/13/1		
	Duties/Supp	Costs - \$1,877.00 (filing	
	Objections	fees, publication, certified copies, recording fees, teleconference	
	Video	charge)	
	Receipt	<u></u>	
	CI Report	Closing - \$500.00	
√	9202	<u> </u>	
✓	Order	Distribution, pursuant to intestate	
	Aff. Posting	succession, is to:	Reviewed by: JF
	Status Rpt	Felie M. Gonzalez - \$26,220.13	Reviewed on: 08/27/13
	UCCJEA	Joe A. Segura - \$26,220.13	Updates:
_	Citation	Enrique A. Segura - \$26,220.13	Recommendation:
^	FTB Notice	Jamie A. Segura - \$26,220.12	File 1 – Segura
		Hector A. Segura - \$26,220.12	
		Oscar A. Segura - \$26,220.12	

Soberal, Jake A. (for James P. Staicer – Son – Conservator – Petitioner)

(1) First and Final Accounting and Report of Conservator of Person and Estate, (2) Petition for Allowance of Termination of Conservatorship and Discharge of Conservator

DO	D: 12-6-13		JAMES P. STAICER, Son and Conservator, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner.	Continued from 8-20-13
				Committee mont 6-20-13
			Revised account period:	Minute Order 8-20-13:
Со	nt. from 082013		9-12-12 through 12-6-12	Counsel is informed that an
	Aff.Sub.Wit.		Accounting: \$18,834.07 / \$993.68	itemization will be needed for
~	Verified		Beginning POH: \$18,834.07	the attorney's fees. Counsel is directed to cure the remaining
	Inventory		Ending POH: \$0.00	defects listed on the examiner
	PTC		Conservator: Not requested	notes. Continued to 9/3/13 at
	Not.Cred.			9:00am in Dept. 303.
~	Notice of Hrg		Attorney: \$4,500.00 (for 25 hours at a reduced	
~	Aff.Mail	W	rate of \$180/hr, per itemization)	Note: Itemization provided.
	Aff.Pub.			See Page 2 re Supplement.
	Sp.Ntc.		Petitioner states conservatorship was necessary	
	Pers.Serv.		to enable Petitioner to access a 403(b) retirement account that was not transferred into	
	Conf. Screen		the Conservatee's trust when it was created.	
	Letters		American United Life Insurance Company was	
	Duties/Supp		not satisfied that the Trust, the Advance Health	
	Objections		Care Directive, or the Special Power of Attorney	
	Video		could be used to transfer the funds into the trust;	
	Receipt		therefore conservatorship was necessary. After	
	CI Report		issuance of letters, the transfer was allowed. The	
	2620(c)		account was never utilized by the	
Ľ	Order		conservatorship estate or accessed by Petitioner because funds never became necessary before	Daviewe d hyrotro
	Aff. Posting		the Conservatee's death. Petitioner has	Reviewed by: skc
	Status Rpt UCCJEA		provided trust account statements as a	Reviewed on: 8-27-13
	Citation		reference to clarify the status of the accounts.	Updates: 8-29-13 Recommendation:
	FTB Notice		·	File 2 – Staicer
			 Petitioner requests an order: Approving, allowing, and settling the account; Terminating the conservatorship; discharging the conservator and the surety on the bond; and Authorizing payment of \$4,500.00 to the attorney for legal services to the conservatorship during the account period. 	

2 Helen Staicer (CONS/PE)

Case No. 12CEPR00302

Page 2

1. The petition filed 7-15-13 had an account period of 6-29-12 through 7-13-13. Examiner Notes previously noted that the accounting was not in compliance with Probate Code §2620(b), which requires a separate accounting for the period after the conservatee's date of death, was not presented on the mandatory Judicial Council forms, and charges and credits did not balance. Further, it was unclear if there was property on hand, as a figure of \$17,840.39 was listed, but the petition indicated that there was nothing left in the conservatorship estate, as it did not request any distribution of that amount.

Supplement filed 8-28-13 puts the summary and schedules on the mandatory forms and revises the account to end at DOD (no subsequent period). The summary indicates POH is zero, but charges and credits still do not balance (\$18,834.07 / \$993.68). In the text, Petitioner explains that the asset – a retirement account – was distributed to the pay on death beneficiary; however, because Petitioner does not include the amount as a credit, and the account still <u>technically</u> does not balance.

<u>Examiner's Note</u>: It appears that if the figure previously provided as POH (\$17,840.39) is the same as the amount described as distributed, had been included in the credits summary, the account would balance, given the revised "receipts" figure; however, because that figure is not specifically referenced here, Examiner cannot assume that it is the same.

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Soberal, Jake A. (for James P. Staicer – Son – Conservator – Petitioner)

(1) First and Final Accounting and Report of Conservator of Person and Estate, (2) Petition for Allowance of Termination of Conservatorship and Discharge of Conservator

Ag	e: 90	JAMES P. STAICER, Son and Conservator, is	NEEDS/PROBLEMS/COMMENTS:
		Petitioner.	
		Account period: 6-29-12 through 7-1-13	Minute Order 8-20-13: Counsel is
Co	nt. from 082013	Accounting: \$66,675.39	informed that an itemization will be needed for the attorney's
	Aff.Sub.Wit.	Beginning POH: \$66,163.99	fees. Counsel is directed to cure
-	Verified	Ending POH: \$ 0.00	the remaining defects listed on
	Inventory	Conservator: Not requested	the examiner notes. Continued to 9/3/13 at 9:00am in Dept. 303.
	PTC	Attorney: \$4,500.00 (for 25 hours at a reduced	10 7/3/13 di 7.00dili ili Depi. 303.
	Not.Cred.	rate of \$180/hr)	1. The Court may require
>	Notice of Hrg	Petitioner states conservatorship was necessary	clarification regarding the
~	Aff.Mail w	to enable Petitioner to access an annuity that	attorney's fee itemizations in this conservatorship and in
	Aff.Pub.	was not transferred into the Conservatee's trust	the spouse's conservatorship
	Sp.Ntc.	when it was created. American United Life	(Page 2 of this calendar):
	Pers.Serv.	Insurance Company was not satisfied that the	, ,
	Conf. Screen	Trust, the Advance Health Care Directive, or	It appears the same exact
	Letters	the Special Power of Attorney could be used	amount of time was spent on each spouse's petition and
	Duties/Supp	to transfer the funds into the trust; therefore	accountings, including 8
	Objections	conservatorship was necessary. After issuance of letters, the transfer was allowed. The	hours <u>each</u> in preparation of
	Video	account was never utilized by the	the petitions, after 7 hours
	Receipt	conservatorship estate or accessed by	<u>each</u> in review and
~	CI Report	Petitioner because funds never became	consultation regarding the
~	2620(c)	necessary before the Conservatee's death.	family circumstances.
~	Order	Petitioner has provided trust account	
	Aff. Posting	statements as a reference to clarify the status	Reviewed by: skc
	Status Rpt	of the accounts. Petitioner further states	Reviewed on: 8-27-13
	UCCJEA	conservatorship is no longer necessary and has	Updates: 8-29-13
	Citation	become detrimental to the Conservatee and	Recommendation:
	FTB Notice	his estate due to the associated costs.	File 3 – Staicer
		 Petitioner requests an order: 4. Approving, allowing, and settling the account; 5. Terminating the conservatorship; discharging the conservator and the surety on the bond; and 6. Authorizing payment of \$4,500.00 to the attorney for legal services to the conservatorship during the account period. 	

Gunner, Kevin D. (for Brett Alan Todd – Executor – Petitioner)

(1) Waiver of Accounting and Petition for Final Distribution Under Will and for (2) Allowance of Statutory Fees and Commissions

DO	D: 9-19-12		BRETT ALAN TODD, Executor with Full IAEA	NEEDS/PROBLEMS/COMMENTS:
			without bond, is Petitioner.	
			Accounting is waived	
	Aff.Sub.Wit.		1&A: \$565,611.97	
~	Verified		POH: \$36,728.09 cash plus a one-half interest in certain real property, and various	
~	Inventory		personal property items and a vehicle.	
>	PTC			
>	Not.Cred.		Executor (Statutory): \$14,374.24	
>	Notice of			
	Hrg		Attorney (Statutory): \$14,374.24	
~	Aff.Mail	w/o	Clasing \$500.00	
-	Aff.Pub.	1	Closing: \$500.00	
-	Sp.Ntc.		Distribution pursuant to Decedent's will:	
	Pers.Serv.	1	Distribution poissonn to beceden 5 wiii.	
	Conf. Screen		Shelby D. Williams: All vehicles and	
_	Letters	12-13-12	personal property items, including jewelry,	
	Duties/Supp	1 .2 .0 .2	watches, art, sports memorabilia listed in	
	Objections		1&A.	
	Video		Brett Alan Todd, as Successor Trustee of the	
	Receipt		James P. Sheely Revocable Living Turst	
	CI Report		Agreement dated March 8, 2012:	
~	9202		Decedent's one-half interest in certain real	
~	Order		property located in Fresno and Kings	
	Aff. Posting	<u> </u>	Counties, plus cash in the amount of	Reviewed by: skc
<u> </u>	Status Rpt	<u> </u>	\$7,479.61	Reviewed on: 8-27-13
-	UCCJEA Citation			Updates:
	FTB Notice	<u> </u>		Recommendation: SUBMITTED File 4 – Sheely
<u> </u>	LID MOTICE	1		rile 4 - Stieely

Bagdasarian, Gary G. (for Bernice Ballesteroz – Administrator – Petitioner)

(1) Waiver of Accounting and Report of Administrator and Petition for Its Settlement; (2) Waiver of Administrator's Commissions; (3) for Allowance of Attorney's Fees for Ordinary Services, and (4) for Final Distribution [Prob. C. 10810, 10811, 10954 & 11640]

DO	D: 11-14-12		BERNICE BALLESTEROZ, Spouse and	NEEDS/PROBLEMS/COMMENTS:
			Administrator with Full IAEA without bond,	, ,
			is Petitioner.	
			Accounting is waived.	
	Aff.Sub.Wit.		I&A: \$281,849.95	
>	Verified		POH: \$287,451.44 (cash)	
>	Inventory		1 011. \$207, 101.11 (Cash)	
~	PTC		Administrator (Statutory): Waived	
~	Not.Cred.		. ,,	
>	Notice of Hrg		Attorney (Statutory): \$8,749.00	
>	Aff.Mail		Distribution pursuant to intestate	
	Aff.Pub.		succession and Assignment of Interest	
	Sp.Ntc.		filed 3-13-13:	
	Pers.Serv.		Davida Dallastavari (270.700.44	
	Conf.		Bernice Ballesteroz: \$278,702.44	
	Screen			
~	Letters	4-11-13		
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
>	9202			
>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 8-28-13
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
~	FTB Notice			File 5 – Ballesteroz

Atty Wright, Janet L., of Wright & Johnson (for Petitioner Donald J. Granz, Jr.)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 5/23/2013	DONALD J. GRANZ, JR., son and named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wit. S/P ✓ Verified Inventory PTC	Full IAEA – O.K. Will Dated: 10/22/2001 Residence: Fresno	1. Need dates of death of DONALD J. GRANZ, predeceased spouse, and KEVIN DONNELLY, grandson, named in Decedent's Will and listed in Item 8 of the Petition, pursuant to Local Rule 7.1.1 (D).
Not.Cred. Notice of Hrg Aff.Mail W/	Publication: Business Journal	Note: If Petition is granted, Court will set status hearings as follows:
✓ Aff.Pub. Sp.Ntc. Pers.Serv.	Estimated value of the Estate: Real property - \$200,000.00 Personal property - \$520,000.00 Annual income from P/P \$ 12,000.00	Friday, February 7, 2014 at 9:00 a.m. in Dept. 303 for filing of final inventory and appraisal; and
Conf. Screen Letters	Total - \$732,000.00	Friday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account
✓ Duties/Supp	Probate Referee: Steven Diebert	and/or petition for final distribution.
Objections Video Receipt CI Report		Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be
9202 ✓ Order		taken off calendar and no appearance will be required.
Aff. Posting Status Rpt UCCJEA Citation		Reviewed by: LEG Reviewed on: 8/27/13 Updates: Recommendation:
FTB Notice		File 6 – Granz

Diaz, Salvador (Pro Per – Petitioner – Father)

Petition to Determine Succession to Real and Personal Property (Prob. C. 13151)

			retition to	Determine Succession t	o keai a	nd Personal Property (Prob. C. 13151)
DC	D: 04/04/2013		SALVADOR D	IAZ, father, is petition	er. I	NEEDS/PROBLEMS/COMMENTS:
		40 days since	DOD		Attachment 11 does not provide the decedent's interest in the	
	1 <i>f</i>		No other prod	ceedings		real property.
Co	nt. from					
	Aff.Sub.Wit.		I&A	\$72,801.65		2. The 2002 Nissan Truck listed on Attachment 11 was not included
✓	Verified		Decedent die	ed intestate.		in the order.
	Inventory					
	PTC			uests to assign his inte		
	Not.Cred.		•	and all property that		
✓	Notice of Hrg		the estate of	a result of being an he Carlos Diaz, to Maria	eir to	
✓	Aff.Mail	w/	Landeros, pe	titioner's daughter.		
	Aff.Pub.		Decedent red	•		
	Sp.Ntc.			n that decedent's int		
	Pers.Serv.			rty located at 1260 Sc Cove, Ca., Wells Farç		
	Conf.			unt #5358043379,	JO	
	Screen			Bank of America		
	Letters		_	count #000077566640	О,	
	Duties/Supp		Bank of Amer			
	Objections			2723, uncashed ched of \$681.71 pass to Mai		
	Video		Landeros.	71 \$601.71 Pass 10 Mai	Iu	
	Receipt		201100100			
	CI Report					
	9202					
✓	Order				<u> </u>	
	Aff. Posting					Reviewed by: L∨
	Status Rpt					Reviewed on: 08/27/2013
	UCCJEA				_	Jpdates:
	Citation				—	Recommendation:
	FTB Notice					ile 7 - Diaz
			_			

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Walters, Jennifer L. (for Korina Bersentes – Petitioner – Daughter)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

petitioner and requests appointment as Administrator without bond. Petitioner is a resident of Superior, Colorado Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Not.Cred. Notice of Hrg Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Vetters Dutles/Supp Objections Video Receipt CI Report 9202 Aff. Posting Status Rpt UCCJEA Cont. Screen Aff. Posting Status Rpt UCCJEA Cint. Cont. Screen Aff. Posting Status Rpt UCCJEA Cint. Cont. Status Rpt UCCJEA Cittlion Fill Notice Time Aff. Posting Status Rpt UCCJEA Cont. Screen Petitioner is a resident of Superior, Colorado. Probate Resident of Superior, Withstanding a waiver of bond, the Court withstanding a waiver of bond, the Court withstanding a waiver of bond, the Court in its discretion may require a nonresident personal representative is a resident of Colorado. Probate Resident of Superior, Withstanding a waiver of bond, the Court withstanding a waiver of bond, the Court withstanding a waiver of bond, the Court in its discretion may require a nonresident personal representative is a resident of Colorado. Probate Resident of Superior, Withstanding a waiver of bond, the Court in its discretion may require a nonresident personal representative bond, the Court in its discretion may require a nonresident personal representative bond, the Court withstanding a waiver of bond, the Court withstanding a waiver of bond, the Court in its discretion may require a nonresident personal representative bond, the Court. 2. Petition states all heirs are adults and have waived bond. Need signed waivers of bond from: • Korina Bersentes • John Bersentes • Jo	DC	D: 05/17/2013	KORINA BERSENTES, daughter is	NEEDS/PROBLEMS/COMMENTS:
Petitioner is a resident of Superior, Colorado Probate Code §857 states not withstanding a waiver of bond, the Court in its discretion may require a nonresident personal property PTC Not.Cred. Not.Cred. Not.Cred. Vaff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Vallets Dobe the Referee: Rick Smith Notes (Superior) Probate Referee: Rick Smith Notes (Superior) Probate Referee: Rick Smith Notes (Superior) Notes (Superi			petitioner and requests appointment	
Cont. from Aff. Sub. Wit. ✓ Verified Inventory PTC Not. Cred. ✓ Nofice of Hrg Sp. Ntc. Pers Serv. Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt CI Report Goldrad Aff. Posting Status Rpt Aff. Posting Status Rpt UCCJEA Aff. Posting Status Rpt UCCJEA Citation Pelitioner is a resident of Superior, Colorado Probate Residencer of Superior, Colorado Publication of Superior, Withstanding a waiver of bond, the Court in its discretion may require a nonresident personal representative to gaine a conversion of prequire a nonresident personal representative to gaine a count. Statis Aff. Posting Personal property \$250,000.00 Probate Referee: Rick Smith Note: If Petition is granted, Court will set status hearings as follows: Friday, February 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Reviewed on: 08/28/2013 Updates: Recommendation:			as Administrator without bond.	
Conf. from			Datition or is a resident of Curaciar	
Aff. Sub. Wit. Verified Full IAEA – o.k. Full	Co	ont. from	·	_
Verified Inventory PTC Decedent died intestate. PTC Decedent died intestate. PTC Noti. Cred. Vaff. Motice of Hirg Publication: The Business Journal Pers. Serv. Pers. Serv. Conf. Screen Valeo Publications Probate Referee: Rick Smith Note: If Petition is granted, Court will set status hearings as follows: Firlday, Rebruary 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off colendar and no appearance will be required. Reviewed on: 08/28/2013 Updates: Recommendation: Require a nonresident personal representative to give a bond in an amount determined by the Court. 2. Petition states all heirs are adults and have waived bond. Need signed waivers of bond from: Norm Bersentes John Bersentes Or in the alternative bond set at \$250,000.00. Probate Referee: Rick Smith Note: If Petition is granted, Court will set status hearings as follows: Firday, Repturary 7, 2014 at 9:00 a.m. in Dept. 303 for filing of final inventory and appraisal; and Firday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filing of final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off colendar and no appearance will be required. Reviewed by: LV Reviewed on: 08/28/2013 Updates: Recommendation:	Ě	ı	Colorado	_
Inventory	√		Full IAEA – o.k.	require a nonresident personal
PTC		Inventory		·
✓ Notice of Hrg Residence: Fresno Publication: The Business Journal 2. Petition states all heirs are adults and have waived bond. Need signed waivers of bond from:		PTC	Decedent died intestate.	•
Wolfic Hirg Residence: Fresno Publication: The Business Journal Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Video Receipt CI Report 9202 ✓ Order Order Aff. Posting Status Rpt UCCJEA Citation Uccjea. Citation Cit		Not.Cred.		
 ✓ Aff.Nail ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Objections Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Korina Bersentes John Bersentes 	✓			and have waived bond. Need
Sp.Ntc. Pers.Serv. Conf. Screen Duties/Supp Objections Video Receipt CI Report 9202 Vorder Aff. Posting Status Rpt UCCJEA Citation Estimated value of the estate: Personal property \$250,000.00 Status Rpt Or in the alternative bond set at \$250,000.00. \$250,000.00. Or in the alternative bond set at \$250,000.00. \$250,000.00. Or in the alternative bond set at \$250,000.00. Status Rpt Or in the alternative bond set at \$250,000.00. \$250,000.00. Note: If Petition is granted, Court will set status hearings as follows: Friday, February 7, 2014 at 9:00 a.m. in Dept. 303 for filing of final inventory and appraisal; and Friday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Reviewed on: 08/28/2013 Updates: Recommendation:	✓	·	rublication. The business Journal	 Korina Bersentes
Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt 7	✓		Estimated value of the estate:	
Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Probate Referee: Rick Smith Probate Referee: Rick Smith Note: If Petition is granted, Court will set status hearings as follows: Friday, February 7, 2014 at 9:00 a.m. in Dept. 303 for filling of final inventory and appraisal; and Friday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filling of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Reviewed on: 08/28/2013 Updates: Recommendation:		Sp.Ntc.		
Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Probate Referee: Rick Smith Note: If Petition is granted, Court will set status hearings as follows: • Friday, February 7, 2014 at 9:00 a.m. in Dept. 303 for filing of final inventory and appraisal; and • Friday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Reviewed on: 08/28/2013 Updates: Recommendation:		Pers.Serv.		
Note: If Petition is granted, Court will set status hearings as follows: Duties/Supp		Conf.		
y Duties/Supp Objections Video Receipt CI Report 9202 √ Order Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Aff. Posting Set status hearings as follows: Friday, February 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Status Rpt UCCJEA Citation Recommendation:		Screen	Probate Reteree: Rick Smith	Note if Bulling is a solution of the
 ✓ Duties/Supp Objections Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Friday, February 7, 2014 at 9:00 a.m. in Dept. 303 for filing of final inventory and appraisal; and Friday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Reviewed on: 08/28/2013 Updates: Recommendation: 	✓	Letters		· —
Video Receipt CI Report 9202 ✓ Order Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Status Rpt UCCJEA Citation inventory and appraisal; and Friday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Reviewed on: 08/28/2013 Updates: Recommendation:	✓	Duties/Supp		• Friday, February 7, 2014 at 9:00
Video Receipt CI Report 9202 ✓ Order Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Status Rpt UCCJEA Citation Priday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Reviewed by: LV Reviewed on: 08/28/2013 Updates: Recommendation:		Objections		-
Receipt CI Report 9202 ✓ Order Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Citation Reviewed on: 08/28/2013 Updates: Recommendation:		Video		
9202 ✓ Order Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Updates: Recommendation:		Receipt		-
✓ Order Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Updates: Recommendation:		CI Report		account and/or petition for final
Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Updates: Recommendation:		9202		distribution.
documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required. Aff. Posting Reviewed by: LV Reviewed on: 08/28/2013 UCCJEA Updates: Recommendation:	1	Order		
Status Rpt UCCJEA Updates: Citation Reviewed on: 08/28/2013 Recommendation:				documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar
UCCJEA Updates: Citation Recommendation:		Aff. Posting		Reviewed by: LV
Citation Recommendation:		Status Rpt		Reviewed on: 08/28/2013
		UCCJEA		Updates:
FTB Notice File 8 – Bersentes		Citation		Recommendation:
		FTB Notice		File 8 – Bersentes

O'Neill, Patricia B. (for Raymond Lyster – grandson/Petitioner)

Petition for Appointment of Temporary Conservatorship of the Person and Estate

Ac	je: 95		GENERAL HEARING 09/26/13		EDS/PROBLEMS/COMMENTS:
_	DOB: unknown		<u> </u>		
			RAYMOND LYSTER, grandson, is		ourt Investigator advised rights on
			petitioner and requests appointment as	08	/27/13.
			temporary conservator of the person	1.	Need Notice of Hearing.
Cc	ont. from		and estate with bond in the amount of \$15,000.00.		-
	Aff.Sub.Wit.		\$13,000.00.	2.	Need proof of personal service at
—	Verified	<u> </u>	Estimated Value of the Estate:		least 5 days before the hearing of Notice of Hearing with a copy of the
	Inventory		Personal property - \$105,000.00		Temporary Petition for:
	PTC		Annual income - 7,200.00		- Myrtle Lyster
	Not.Cred.	<u> </u>	Total - \$112,200.00	2	Need proof of contine by mail of
		\	Datition and other than the second	٥.	Need proof of service by mail at least 5 days before the hearing of
	Notice of Hrg	Х	Petitioner states that the proposed conservatee has alzheimer's and does		Notice of Hearing with a copy of the
	Aff.Mail	Х	not have the ability to manage her		Temporary Petition for:
	Aff.Pub.		finances. She has an annuity that will		- Larry Lyster (son)
-			disbursed to her on 09/03/13.	4.	Need Confidential Supplemental
-	Sp.Ntc.		Temporary conservatorship is necessary		Information.
	Pers.Serv.	Χ	in order to sign the documents to elect	l _	
*	Conf. Screen		to have the annuity paid out in a lump	5.	Petitioner requests that bond be set at \$15,000.00; however, based on
√	Letters		sum.		the estimated value of the estate,
<u>*</u>		<u> </u>	Court Investigator Julie Negrete filed a		bond should be set at \$123,420.00,
Ě	Duties/Supp		report on 08/29/30.		which includes the cost of recovery
	Objections		,, -,		as required under Probate Code § 2320(c)(4).
	Video				2020(0)(4).
	Receipt	\		6.	Need CI report and advisement of
	CI Report	Х			rights – CI to provide.
	9202				
 	Order			Pa	eviewed by: JF
	Aff. Posting				eviewed by: JF
	Status Rpt UCCJEA	<u> </u>			odates: 08/28/13
	Citation				ecommendation:
	FTB Notice				e 9 – Lyster
<u> </u>	FID NOTICE			Luc	e / - Lysiei

10 Fred Otto Loeffler (CONS/PE)

Case No. 13CEPR00655

Atty Downing, Marcella Atty Rube, Melvin K.

Atty Magness, Marcus D.

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

1	1020, 1021, 2000-2002)	
Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
		<u>CONTINUED TO 09/18/13</u>
		In Dept. 502 @ 9:00am
Cont. from		Per minute order from
Aff.Sub.Wit.		hearing on 08/19/13
Verified		_
Inventory		
PTC		
Not.Cred.		
Notice of	7	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt	=	
CI Report	4	
9202	4	
Order	4	2
Aff. Posting	_	Reviewed by: JF
Status Rpt	4	Reviewed on: 08/27/13
UCCJEA	-	Updates:
Citation	-	Recommendation:
FTB Notice		File 10 – Loeffler

Atty Downing, Marcella
Atty Magness, Marcus D.

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

1	1020, 1021, 2000-2002)	-
Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
		<u>CONTINUED TO 09/18/13</u>
		In Dept. 502 @ 9:00am
Cont. from		Per minute order from
Aff.Sub.Wit.		hearing on 08/19/13
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt	=	
CI Report	_	
9202	_	
Order	_	P. 1
Aff. Posting	_	Reviewed by: JF
Status Rpt	_	Reviewed on: 08/27/13
UCCJEA	-	Updates:
Citation FTB Notice	-	Recommendation:
L LIP NOTICE		File 11 – Loeffler

	Tee Walver Review	NEEDS/PROBLEMS/COMMENTS:
		CONFIDENTIAL
Cont. from 052013,		
072313		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp Objections		
Video		
Receipt		
CI Report		
9202	•	
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 8-27-13
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 12 – Gomez

Velasquez, Ruth (pro per – paternal great-aunt/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

	Petition for Appointment of Guardian of the Person (Prob. C. 1510)					
Age: 10			NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:		
			RUTH VELASQUEZ , paternal great-aunt, is Petitioner.	Need proof of service by mail at least 15 days before the hearing of Notice of Hearing		
Со	Cont. from		Father: JOEY ALVIAR – Personally served on 07/20/13	with a copy of the Petition for Appointment of Guardian of		
	Aff.Sub.Wit.		Mother IEANNIE ALVIAD Concept 9	the Person <u>or</u> Consent &		
√	Verified		Mother: JEANNIE ALVIAR – Consent & Waiver of Notice filed 06/24/13; Personally	Waiver of Notice <u>or</u> Declaration of Due Diligence		
	Inventory		served on 07/03/13	for:		
	PTC		3333	- Dominic Alviar (brother)		
	Not.Cred.		Paternal grandfather: AMADOR ALVIAR -	- Alexander Alviar (brother)		
✓	Notice of		deceased			
	Hrg		Paternal grandmother: ANNIE ALVIAR -			
	Aff.Mail	Х	deceased			
	Aff.Pub.		Maternal grandfather: JONAS ALBERT -			
	Sp.Ntc.		deceased			
✓	Pers.Serv.		Maternal grandmother: BERNICE ALBERT –			
✓	Conf.		deceased			
	Screen					
√	Leneis		Siblings: DOMINIC ALVIAR (18), ALEXANDER			
✓	Duties/Supp		alviar (13), brianna alviar (6)			
	Objections		Petitioner states: due to a domestic			
	Video		dispute, the child's mother can no longer			
	Receipt		provide a stable home. The mother			
✓	CI Report		agrees that Petitioner should have			
	9202		guardianship because she is able to			
√	Order		provide a safe and stable home.			
	Aff. Posting		Court Investigator Jo Ann Morris filed a	Reviewed by: JF		
	Status Rpt		report on 08/26/13.	Reviewed on: 08/27/13		
✓	UCCJEA	<u> </u>		Updates:		
	Citation			Recommendation:		
	FTB Notice			File 13 - Alviar		

Atty Martinez, Christine (pro per Petitioner/paternal grandmother)

Atty Davis, Catherine (pro per, maternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 1 year			TEMPORARY EXPIRES 9/3/2013	NEEDS/PROBLEMS/COMMENTS:		
			CHRISTINE MARTINEZ, paternal grandmother, is petitioner.			
Co ✓ ✓	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail	 	Father: JULIAN VALENCIA – consents and waives notice. Mother: JESSICA VALENCIA – consented and waived notice but now objects. Paternal grandfather: Deceased. Maternal grandfather: Deceased. Maternal grandmother: Catherine Medina (Davis).			
✓ ✓ ✓	Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp		Petitioner states neither parent is fit to raise the child. Father is incarcerated. Mother is on drugs. Objections of mother, Jessica Valencia, filed on 7/18/2013 states she was tricked into signing the court documents. She was under the			
	Objections Video Receipt		impression that they were going to help her to keep her child from being removed from her custody. Mom states Christine's home has been			
√ √ √	9202 Order Aff. Posting Status Rpt UCCJEA		targeted by the police as a known drug house with heavy trafficking. She is classified as an alcoholic, who drinks often and in heavy dosages. Mom states her mother, Catherine Davis, is in the process of moving into her home to help her care for the minor.	Reviewed by: KT Reviewed on: 8/28/2013 Updates:		
	Citation FTB Notice		Court Investigator Charlotte Bien's Report filed 8/27/2013.	Recommendation: File 14A – Valencia		

Atty Martinez, Christine (pro per paternal grandmother)

Atty Davis, Catherine (pro per, Petitioner/maternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 1 year			TEMPORARY (granted to paternal	NEEDS/PROBLEMS/COMMENTS:
			grandmother, Christine Martinez) EXPIRES 9/3/2013	Need Notice of Hearing.
C C C C C C C C C C C C C C C C C C C	Aff.Mail Aff.Pub. Sp.Ntc.	X	CATHERINE DAVIS, maternal grandmother, is petitioner. Father: JULIAN VALENCIA Mother: JESSICA VALENCIA – consents and waived notice Paternal grandfather: Deceased. Paternal grandmother: Christine Martinez Maternal grandfather: Deceased. Petitioner states the child is living in an unstable environment with a woman who is nervous and has anger issues and is known for consuming liquor. The minor is not safe, she is often neglected and left unattended in a play pen for long periods. Court Investigator Charlotte Bien's Report filed 8/27/2013.	 Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: Julian Valencia (father) Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: Christine Martinez (paternal grandmother)
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 8/28/2013
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 14B – Valencia

14B

Perry, Margarita (Pro Per – Petitioner – Spouse)

Petition to Determine Succession to Real Property (Prob. C. 13151)

Petition to Determine Succession to Redi Prop					
DOD: 04/15/2013			MARGARITA PERRY, spouse, is	NE	EDS/PROBLEMS/COMMENTS:
			petitioner.	,	D. Pit
			40 days since DOD	1.	Petition was opened using a Fee Waiver. Filing fees are considered cost of administration
Со	nt. from		No other proceedings		and must be paid prior to
	Aff.Sub.Wit.		,		distribution of property. Filing fee
✓	Verified		I&A \$80,000.00		of \$435 is now due.
✓	Inventory		Decedent died intestate	2.	Per intestate succession the
	PTC		Dell'ille de la company de Company		decedent's father, James Perry, is
	Not.Cred.		Petitioner requests Court determination that decedent's 100%		entitled to one half of the decedent's estate. Therefore he
1	Notice of		interest in real property located at		will need to join in as a petitioner
Ľ	Hrg		1854 21st, Kingsburg, Ca. pass to		and an amended petition will
✓	Aff.Mail	w/	Margarita Perry pursuant to intestate succession.		need to be filed.
	Aff.Pub.		succession.		
	Sp.Ntc.				
	Pers.Serv.				
	Conf.				
	Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting			Re	viewed by: LV
	Status Rpt			Re	viewed on: 08/28/2013
	UCCJEA			Up	dates:
	Citation			Re	commendation:
	FTB Notice			File	e 15 – Perry

16 Mikenzi R. Burt & Justin L. Sorrells (GUARD/P)

Case No. 13CEPR00743

Pro Per Pro Per Burt, Johnny (Pro Per Petitioner, maternal grandfather Athans, Kimberly (Pro Per Petitioner, step-grandmother)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Mikenzi Age: 7 yrs	Conoral Hearing and for 10/24/2012		
	General Hearing set for 10/24/2013	NEEDS/PROBLEMS	
Justin Age: 1 ½ yrs	JOHNNY BURT and KIMBERLY ATHANS, maternal grandfather and step- grandmother, are Petitioners.	If Court does notice to the Mikenzi as Perneed Notice of the control of the	
Cont. from Aff.Sub.Wit.	Father of Mikenzi: DUANE BRANUM	proof of five (
✓ Verified Inventory PTC	Father of Justin: JUSTIN LEVI SORRELLS ; sent notice by mail 8/21/2013; personally served 8/25/2013.	notice by per the Notice of copy of the P Appointment Guardian, or Appointment and Waiver o Declaration of	
Not.Cred. Notice of Hrg Aff.Mail	Mother: HAILEY BURT-SORRELLS ; sent notice by mail 8/21/2013; personally served 8/25/2013.		
Aff.Pub.	Paternal grandfather: Unknown Paternal grandmother: Unknown	 Duane Bro Mikenzi (no from Petiti Guardians 	
Sp.Ntc. ✓ Pers.Serv.	Maternal grandmother: Shelley Scott; sent notice by mail 8/21/2013. Petitioners state both parents have a long	Questionn	
✓ Conf. Screen ✓ Letters	history of drug addiction, and the children have been in the Petitioners care for over a month now. Petitioners state the parents are		
✓ Duties/Supp	not stable and cannot properly care for the children at this time, as they do not have		
Objections Video Receipt CI Report	adequate housing and are suffering from drug addiction. Petitioners state both children are subject to CPS but are currently with Petitioners in a safe and stable loving		
9202 √ Order	home environment, and require protection pending the general hearing. Petitioners request to be excused from		
Aff. Posting	giving notice to Mikenzi's father because his	Reviewed by: LEG	
Status Rpt	identity and whereabouts are unknown to	Reviewed on: 8/2 Updates:	
Citation	Petitioners (no father is listed on the birth certificate.)	Recommendatio	
FTB Notice		File 16 – Sorrells	

EMS/COMMENTS:

- es not excuse he father of Petitioners request, ce of Hearing and re (5) court days' personal service of of Hearing with a e Petition for ent of Temporary or Consent to ent of Guardian er of Notice, or a n of Due Diligence
 - Branum, father of (name obtained titioners' anship nnaire.)

LEG 8/27/13 ition:

Rodgers, Vonda Marie (Pro Per – Petitioner – Maternal Grandmother)

ary Guardianship of the Person (Prob. C. 2250)

		1	Petition for Appointment of Temporary Guard	
	ydence 5 mos.		TEMPORARY EXPIRES 09/03/2013	
Jaz	zmine 4		CENTER AT THE A DINIC 10 /04 /0012	
			GENERAL HEARING 10/24/2013	
Cc	ont. from		VONDA MARIE RODGERS, maternal	
	Aff.Sub.Wit.		grandmother, is petitioner.	
✓	Verified		Father of Jazmine: JOHNNY AVILA III ,	
	Inventory		Deceased	
	PTC		Father of Kaydence: NOT LISTED	
	Not.Cred.		,	
√	Notice of		Mother: CRYSTAL RODGERS	
	Hrg		Destarte al Crain dia arrante of lazzosia a Net	
	Aff.Mail	n/a	Paternal Grandparents of Jazmine: Not Listed	
	Aff.Pub.		Paternal Grandparents of Kaydence: Not	
	Sp.Ntc.		Listed	
✓	Pers.Serv.		Maternal Grandfather: Joey Rodgers	
<u></u>	Conf.			
	Screen		Petitioner states : the mother is doing drugs,	
✓	Letters		is unstable and does not want the children.	
✓	Duties/Supp		Petitioner is scared for her life and that of the children's as the mother has already	
	Objections		pushed and hit the petitioner and has	
	Video		threatened to kill the petitioner if she takes	
	Receipt		the children.	
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			

NEEDS/PROBLEMS/COMMENTS:

- 1. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
 - Father of Kaydence (Not Listed)

Note: Notice of Hearing filed 08/23/2013 states unknown father, no one to send to.

Reviewed by: LV **Reviewed on:** 08/28/2013 **Updates: Recommendation:** File 17 - Palma & Avila

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